

# *IBM/PeopleSoft*

## **Sizing and Planning Questionnaire**

IBM Sizing Center  
1-800-IBM-0222

When completed, please

Send electronically to [eSizings@us.ibm.com](mailto:eSizings@us.ibm.com)

or

fax to:  
**1-845-491-2372**

(Version 10.03.2002.10)

**New version update every 60 days**

Please use this document to gather information that will be used to size PeopleSoft applications on IBM platforms. Direct questions regarding this questionnaire to the IBM Sizing Center as listed above.

A sizing estimate is an approximation of the hardware resources required to support an ERP implementation. It is a pre-sales effort based on information available at a point in time, providing an entry into understanding the customer's hardware requirements. Customers' actual experiences will vary from the sizing estimate for many reasons, including batch and reporting workloads, and custom code. The degree of variability can range from small to very significant. IBM assumes no liability for actual results that differ from the sizing estimate.

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Dear Customer:

Thank you for the requesting a sizing estimate for your IBM-PeopleSoft implementation. As one of PeopleSoft's leading alliance partners, IBM can provide the total infrastructure required to implement your PeopleSoft solution including hardware, software, middleware, services and financing. By following a highly successful, proven sizing process, IBM can recommend an infrastructure that can meet your needs today as well as grow with you in the future. The output consists of a customized approximation of the hardware resources (processor, memory, and disk space) required to support your PeopleSoft applications. Please note: the accuracy of the sizing estimate is highly dependent upon the accuracy and completeness of the responses in the attached questionnaire.

To help this process go as smoothly as possible, we would like to offer the following suggestions:

1) To ensure that you receive the best possible results, please consult members of your organization that are knowledgeable in the areas affected by the PeopleSoft products you are considering. They will probably have the best view of how your company will use these applications and will be able to answer many of the questions asked in this document. This helps insure that the document is as complete and more accurately reflects your company's environment. It is also recommended that you contact you local IBM representative. They will review the questionnaire input and will help you incorporate the output into your over all project plan. If you need assistance in contacting your IBM representative please send and e-mail to [psft@us.ibm.com](mailto:psft@us.ibm.com)

2) As you proceed in your evaluation, it is vital that all affected business units, information technology departments, end users and decision makers are made aware and are in agreement with your goals and objectives. We have found that the most successful implementations are those where planning and teamwork are given the highest priorities<sup>3</sup>). We recognize that it may be difficult to provide exact numbers on many of these questions. A sizing estimate is based upon information available and a particular point in time and is subject to change. As your implementation progresses, new data unique to your implementation will become available. At that time you will find it advantageous to revisit the sizing process. In fact, IBM as well as PeopleSoft recommends that customers re-size their PeopleSoft environment at least three times during their project cycle:

1. Early in your project planning phase
2. After implementation.
3. During testing as required when workload parameters change.

Thank you for considering an IBM-PeopleSoft solution. If you have any questions or need help completing this questionnaire, please contact us at 1-800-IBM-0222.

Thank you!  
IBM

# Company Information:

<b>Company Name:</b>	
<b>Street Address:</b>	
<b>City, State Zip</b>	
<b>Contact Person:</b>	
<b>Phone Number:</b>	
<b>Email address:</b>	
<b>FAX Number:</b>	
<b>Industry:</b>	
<b>Other Vendors:</b>	
<b>IBM Client Rep:</b>	
<b>Phone Number:</b>	
<b>Email address:</b>	
<b>IBM Product Specialist:</b>	
<b>Phone Number:</b>	
<b>Email address:</b>	
<b>PeopleSoft Partner:</b>	
<b>Phone Number:</b>	
<b>Email address:</b>	
<b>OMSYS Number: (completed by IBM)</b>	

## Suggestions for completing this document:

This document is composed of two sections or parts. Part 1 helps us determine if any additional requirements are needed regarding this PeopleSoft implementation. Part 2 is used to estimate the size and number of IBM processors to support your PeopleSoft on-line users and application batch requirements. The following terms and instructions will help you answer the questions appropriately.

- **New Workload** - The detailed description of user counts and batch application jobs that are found in Part 1 are for new workloads only. Please do not include a description of user counts and batch application jobs information for currently running workloads.
- **Existing Workload** - If you plan to add a new workload to an existing PeopleSoft production system, a table is provided below to describe that system.
- **Total User Population** - The total number of “named” users that may or may not access the PeopleSoft application. This is potentially everyone that could sign on to the PeopleSoft application. This pertains to new workload only.
- **Total Active Concurrent Users** - The peak number of users during a one-hour period that are logged into a PeopleSoft application actively doing work. The one-hour period should be the time of day when you have the most user activity. **It important that no single person is counted twice. For instance, a user may be logged on the Accounts Payable and Purchasing applications at the same time. Please count them once in the application that they use the majority of the time during the peck hour.** A user that logs on to an application but never submits any transactions (updates or requests via PeopleSoft’s interface) is not an active concurrent user. Different users will affect the processing requirements based on their type of work (application) and their intensity. To distinguish the type of active concurrent user for each application, use the designation of HEAVY, MODERATE, or LIGHT.
- **HEAVY USER** - a user whose principal job requirement is to enter, request and update data. They submit transactions frequently. This type of user is sometimes referred to as a “power user” operating in a “heads down” data entry or update mode. This pertains to new workload only.
- **MODERATE USER** - a user that enters data, requests data and updates the database regularly but their requirements are not as intense as those of a heavy user. You may consider a moderate user workload is half as much as a heavy user workload. This pertains to new workload only.
- **LIGHT USER** - a user that submits PeopleSoft requests or updates infrequently (for example a few times an hour). This pertains to new workload only.
- **CAPACITY PLANNING** - It is assumed that this sizing request is for an estimate of IBM systems that will run new PeopleSoft applications in your organization. The request is defined as a “new pre-sales sizing request”. If you already have an existing IBM system running PeopleSoft applications and you would like to add more users or batch application work, you need capacity planning assistance. For capacity planning assistance please contact your IBM ERP Sales Specialist. If your capacity planning needs are S/390 related, please contact IBM Techline at (888) 426-5525

- If you are considering switching your PeopleSoft applications from another vendor to IBM, please contact your IBM ERP Sales Specialist because additional information would be required about your environment.
- Periodically, the IBM-PeopleSoft Sizing and Planning Questionnaire is revised. Before taking the time to complete it, you should make sure you have the most recent version. To obtain a softcopy of the questionnaire, use the URL: [www.ibm.com/erp/sizing](http://www.ibm.com/erp/sizing) or send a request to the IBM Sizing Center at [esizings@us.ibm.com](mailto:esizings@us.ibm.com).

## Part 1 - Platform Selection

Please indicate the desired PeopleSoft release and server and Database information for this sizing.

**PeopleSoft Release**                     7.5x                     8.x                     8.4  
**Database Server:**                     pSeries                     xSeries                     zSeries  
**Application Server:**                     pSeries                     xSeries  
**Type of Database:**                     DB2                     Other: Please specify \_\_\_\_\_

Are PeopleSoft applications currently installed at your company on a production system? Yes \_\_\_ No \_\_\_

Do you plan to run a new workload on a currently installed PeopleSoft production system? Yes \_\_\_ No \_\_\_

Please complete the following table to describe the installed system.

	Database Server	Application Server	Batch Server	Report Server	Non-Production Server(s)
Vendor/Model e.g. IBM - pSeries 690					
No. of processors/speed e.g. 8 X 1.1 GHz					
Memory (gb)					
Percent of CPU Utilization at the peak time e.g. 55%					
Physical disk size e.g. (GB)					
PeopleSoft DB storage size (GB)					
* Peak non-OLTP %					

Please provide to the best of your abilities the percentage of work allocated to PeopleSoft reporting and ad hoc queries. Please express it as a percentage. For example, 30% of our end user workload is reporting and query work. \_\_\_\_\_

## PART 2: System Configuration

System Configuration Input and Default values:

<b>Customer Preferences: default bolded</b>	<b>Planned</b>
Mirrored disks (applies to pSeries-RS/6000) ( <b>Y</b> /n)	
RAID disks (applies to xSeries and pSeries ) ( <b>Y</b> /n for xSeries)	
Logical three-tier configuration (y/ <b>N</b> ) –	
Physical three-tier configuration ( <b>Y</b> /n) -	
Dual systems hardware failover (i.e. HACMP for DB server) ( <b>Y</b> /n)	
Dual systems hardware failover (i.e. Redundant Application servers) (y/ <b>N</b> )	
Network failover (i.e. redundant web servers) ( <b>Y</b> /n)	
UPS in each system (y/ <b>N</b> )	

**System Infrastructure and Support:**

<i>Customer Preferences:</i>	<i>EXISTING</i>	<i>PLANNED for this workload</i>
Tape Subsystem requirements		
Performance Tools S/W required		



## **PART 3: Processor/Memory Sizing Inputs:**

**Please complete the tables on the following pages for each of the applications that you will be implementing.**

**If you are installing applications that are not listed in one of the application suites, please write the application in one of the rows labeled “Other”. If you are not sure which suite the application is in, please contact your PeopleSoft representative, or you can look on the PeopleSoft Customer Connection Web Site at [www.peoplesoft.com](http://www.peoplesoft.com). Access "Product" and then "Product Lines", which will list all of the applications in each application suite.**

Please identify if the new workload that will be described in the table below is for a new system or if additional modules are being added to an installed system:

**New System**

Yes\_\_\_ No\_\_\_

**Additional Modules being added to an installed system**

Yes\_\_\_ No\_\_\_

APPLICATION	Total Named Users (See NOTE1)	ACTIVE CONCURRENT USERS (See NOTE2)			Total Active Concurrent Users in 3 Years (if known)
		Heavy	Moderate	Light	
<b>Human Capital</b>					
HR					
Benefits					
Payroll					
Time & Labor					
Reporting					
Other:					
<b>Learning</b>					
Admissions					
Student					
Other:					
<b>HR Self Serve</b>		<i>The HR Self Serve application sizing does not distinguish between types of users. In the rows below specify the total number of concurrent users for each function.</i>			
eBenefits					
ePAY					
Other:					
Other:					

**NOTE 1:**Please include ALL users that will have access to the application in the Total Named Users Column. Do not count users twice (For Example: If you have 5 Benefits users who also use the Payroll application, please specify a total of 5 users between the 2 applications.

**NOTE 2:**The sum of the Heavy, Moderate and Light users should equal your Peak Concurrently Active users. Do not count users twice

APPLICATION	Total Named Users (See NOTE1)	ACTIVE CONCURRENT USERS (See NOTE2)			Total Active Concurrent Users in 3 Years (if known)
		Heavy	Moderate	Light	
<b>Financials</b>					
General Ledger					
Accounts Payable					
Accounts Receivable					
Asset Mgt.					
Project Costing					
Budget Reporting					
Other:					
Other:					
<b>Supply Chain Management</b>					
Purchasing					
Inventory					
Billing					
Order Mgmt					
Other:					
Other:					
<b>Supply Chain Self Service</b>		<i>The Supply Chain Self Service sizing does not distinguish between types of users. In the rows below specify the total number of concurrent users for each function.</i>			
eProcurement					
eProduct Mgt.					
eBilling Payment					
eStore					
eSupplier Collaboration					
Other:					
Other:					

**NOTE 1:**Please include ALL users that will have access to the application in the Total Named Users Column. Do not count users twice (For Example: If you have 5 GL users who also use the AR application, please specify the 5 users either for GL, or for AR, NOT both.)

**NOTE 2:**The sum of the Heavy, Moderate and Light users should equal your Peak Concurrently Active users. Do not count users twice.

<b>APPLICATION</b>	<b>Total Named Users (See NOTE1)</b>	<b>ACTIVE CONCURRENT USERS (See NOTE2)</b>	<b>Total Active Concurrent Users in 3 Years (if known)</b>
<b>CRM</b>		<i>The CRM application sizing does not distinguish between types of users. In the rows below specify the total number of concurrent users for each function.</i>	
Support			
Sales			
Field Service			
Help Desk			
Marketing			
Interaction Mgmt			
Other:			
Other:			
<b>PS Portal</b>			
	<b>What is the peak number of concurrent users of the PeopleSoft portal applications?</b>		<b>#</b>
<b>Other PeopleSoft Applications</b>			
<b>EPM</b>			
Other:			

**NOTE 1:**Please include ALL users that will have access to the application in the Total Named Users Column. Do not count users twice (For Example: If you have 25 Sales users who also use the Support application, please specify the 25 users either for GL, or for AR, NOT both.)

**NOTE 2:**The sum of the Heavy, Moderate and Light users should equal your Peak Concurrently Active users. Do not count users twice.

Non-production Systems	Total Number Of (concurrent) Instances See NOTE 3	ACTIVE CONCURRENT USERS (See NOTE 2)			Total Active Concurrent Users in 3 Years (if known)
		Heavy	Moderate	Light	
<b>Example: Test</b>	<b>2</b>	<b>4</b>	<b>2</b>	<b>1</b>	
Development					
Test					
Training					
Quality Assurance					
Other					
Other					
<b>Total number of (concurrent) non-production instances</b>					
EPM					
CRM					
Other:					

**NOTE 2:**The sum of the Heavy, Moderate and Light users should equal your Peak Concurrently Active users. Do not count users twice.

**NOTE 3:** Please include ALL (concurrent) instances of each functional non-production system in the 'Total Number of Instances' Column. The default for total number of concurrent instances for all non-production is 3.

## Batch processing requirements:

Please fill in Table 1 providing information about your batch application(s), for example:

Application = Payroll

Total “items” processed = 40,000 paychecks

Number of “items” in the largest group to process = 10,000 paychecks

### Definitions

Application: The desired batch job to be completed.

Total “items” processed The total amount of things to process, e.g. number of paychecks for Payroll, journal lines for General Ledger, or invoices for Accounts Receivable etc.

# Items in largest group: If the total “items” processed is composed of separate groups within the batch job, e.g. multiple paygroups for Payroll or multiple business units for General Ledger, how large is the largest group? We use this information to make sure the largest subgroup can run on a single processor of a multiple processor system in batch windows specified in Table 1.

Table 1 - Identify the batch processes that apply to your company and specify the time required to complete each batch job:

Application	Item type	Total “items” processed on a peak day	Number of “items” in the largest group processed on a peak day	Time of day job runs (ex. 10am-3pm)	Maximum time period for job to run (ex. 2-3 hrs)
Payroll	paychecks				
Benefits Administration	employees				
Time & Labor	employees				
General Ledger	journal lines				
Accounts Receivable	invoices				
Accounts Payable	vouchers				
Inventory	# of lines				
Purchasing	# of lines				
Billing	# of lines				
Other batch Processes					

During what time of day is your system at peak usage (ex. 9am-5pm)\_\_\_\_\_?